

# **NextGen User Guide**

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# Introduction

NextGen, PJM's planning tool, is designed to be a one-stop shop for stakeholders and PJM planners engaged in the generation interconnection process. NextGen allows users to enter information for New Service Requests and manage their portfolio of projects throughout the interconnection process.

PJM uses the information provided through NextGen to conduct studies to identify transmission system enhancements needed to maintain grid reliability in order to accommodate the request. NextGen is used to facilitate the application process by providing:

- Application reviews
- Automated notifications
- Letters of Credit tracking

This user guide will show you how to use and request access for NextGen.

# **Requesting Access to NextGen**

Access to NextGen is granted through Account Manager and is only available for users logged in under a Member or Non-Member company. Please note that if you are logged in as a user from an "Other" company, you will not see NextGen roles. NextGen requires users to be registered under a company to show the projects and information associated with that organization.

If your company is not an active Member and/or you do not have an account, please visit the <u>Account Manager page</u> for further guidance on Non-Member Company Account Managers (CAMs) and Non-Member accounts.

Account Manager	
Account Manager is a tool used to create accounts and re- and website.	quest and grant access to PJM's tools
Production: Sign In   Register	
Train Environment: Sign In   Register	
If your company is not a member of PJM or your company account, request a company account be created.	is not listed when registering for an
Release Notes	
Acceptable Terms of Use	
Data connections should not exceed 600 per minute.	
Account Managers Requests (CAM)	
Members	
Update Voting or Affiliate Member CAM (All Tools)	
Other or Non-Member (CAM)	
Add/Remove (CAM) or New Company Account	
Account Rename Request	
Form A1 (PDF) - authorization for non-PJM members/mark	ket participants for use of PJM bilateral
nouse contraction Bullatio Reard	

If your company is an active member of PJM:



- 1. Go to Account Manager.
- 2. Log in to Account Manager with your user ID and password and request the appropriate role.
  - NextGen Read Only: Users can view information within NextGen but cannot edit nor submit applications.
  - NextGen Read/Write: Users can view and edit information within NextGen and submit applications.
  - NextGen Agent: Users can view and edit project data within NextGen but cannot submit new applications.

If you do not see the appropriate role available, request access through your CAM. They will be able to authorize your access to the NextGen role. You may be required to create a new user ID under the specific organization provided by your CAM.

If your CAM administrator is not familiar with NextGen, please contact <u>custsvc@pjm.com</u>.

For any additional questions and guidance, please contact <u>custsvc@pjm.com</u>.

# **Company Profile**

The **Company Profile** is where users establish their company within NextGen by providing information about their company, its parent company and any associated project and corresponding companies. Each company will have one Company Profile that is shared with all users associated with that company. Therefore, any updates made by one user will be reflected on the Company Profile page for all other users. Company Profile information will be used during the application process and may be updated at any time during the interconnection process. PJM staff will be notified when changes on the Company Profile page impact a project. Users are responsible for maintaining the information shown on the Company Profile. The intent of this is to allow project development companies to "self-service" the administrative information associated with their company and underlying projects. This will ensure PJM always has the latest contact information available for project communication.

In the example below, employees of "TerraWatt" will create accounts in Account Manager and request the appropriate NextGen access. Information pertaining to TerraWatt is entered in the Company Information section of the form. If there is a parent or holding company, such as "Petawatt Holdings" in the example below, that information should be added to the Company Profile as well. Similarly, the Company Profile allows Project Developers to create project-specific LLCs that fall under their corporate umbrella that can then be associated with interconnection applications. The main company (TerraWatt) and Affiliated Applicants (i.e., underlying project-specific LLCs) may be selected when submitting New Service Requests.



#### **Example Organizational Chart**



# Accessing NextGen

After establishing a username and password in Account Manager, users can access NextGen at nextgen.pjm.com.

# Accessing the Company Profile Page

If you have not completed a Company Profile when you start your first application, NextGen will automatically navigate you to the Company Profile page from the Applicant Information section. The Company Profile must be completed before an application can be saved. Once you complete the Company Profile and click **Save & Continue Application**, NextGen will navigate you back to the Applicant Information section to continue completing the application.



In the Applicant Information section, you can now select the appropriate Project Developer or Eligible Customer from the drop-down. The Company Profile information for the company selected will be shown in the Applicant Information section.

. <b>∌∕pjm</b> ∵∣ NextGen					
Projecto Costo Tentino O Latino e	( Carally ) Comment Bar (la	New Protock Acadimation		1	Merch
Applicant Information	Applicant Information	New Project Application			
Point of Interconnection Merchant Transmission Facility	Project Name *			Project ID	
Site Control & Supporting Documents	123 Project			C01-1005	
Transformer Information Deposits	PJM Interconnection	Lustomer for this application *	~		
Review					
Confirmation	PJM Interconnection PJM-Sub Project Developer				

If you need to make changes to the company information while in the Application Information section, click on the **Edit** button to navigate to the Company Profile page where you can make any edits. After completing the updates on the Company Profile page, click **Save & Continue Application**. NextGen will navigate you back to the Applicant Information section to continue the application. The updates you made on the Company Profile page will be reflected in this section.

				Merchant Transmission Facility Reques
Projects Cycle Timelines Lette	rs of Credit Company Profile New Project Application			
Applicant Information Point of Interconnection Merchant Transmission Facility	Applicant Information Project Name * 122 Project		Project ID	
Site Control & Supporting Documents Transformer Information	Project Developer or Eligible Customer for this application *			
Deposits	PJM Interconnection	~		
Review			1	
Confirmation	PJM Interconnection			Edit
	PJM-Sub Project Developer			Country *

If you need to update company information at any other time, click on the **Company Profile** tab at the top of the page. When you complete the updates, click **Save**.





# Creating and Maintaining a Company Profile

Each company has a single Company Profile that all users associated with the company (as established in Account Manager) can access. A user must fill out their company's Company Profile before completing New Service Requests. This profile establishes the relationship between the user's company and parent company, if applicable, as well as any Affiliated Applicants. Any Project Developer or Eligible Customer affiliated with the company will be listed under the Affiliated Applicants section of the Company Profile. Users are expected to maintain the Company Profile at all times and may make updates at any point during the interconnection process.

The following documents are required to complete the Company Profile. Make sure you have these documents readily available before trying to complete the profile.

- W-9: Required for the user's company and each Affiliated Applicant (Affiliated Applicant is the name of the entity that is associated with a New Service Request.)
- Evidence of Binding Relationship: Required for each Affiliated Applicant
- Evidence of Ownership: Required for Parent Company

The Company Profile consists of three sections: **Company Information**, **Parent or Holding Company Information**, and **Affiliated Applicants**.

### **Company Information**

In this section, you will add contact information for the company you are associated with in Account Manager. The page heading will display the name of the company your login is associated with. Using the example from above, employees of TerraWatt would see what is shown below. Since the user works for TerraWatt and is logged in under their associated account, the Company Information displayed is for TerraWatt. A W-9 matching the company name must be uploaded to the Company Profile.





### Parent or Holding Company

In this section, you will add contact information for a parent company or holding company, if applicable. The parent company owns or controls the primary company but is not contacted regarding project-related matters. The parent company name may be used to connect a Project Developer to their Site Control documents and applicants. To display the fields for the parent company, answer yes to the below question. You will also need to upload evidence of the parent company's ownership of the primary company.



### Affiliated Applicants

In this section, you will add and edit information for Affiliated Applicants. Affiliated Applicants can be considered "underlying LLCs" owned and operated by the company. These Affiliated Applicants are frequently the Project Developer or Eligible Customer for a Cycle project and are what appears as the New Service Request application and associated agreements. You must provide supporting documentation, such as a W-9, and evidence of a binding relationship between the Affiliated Applicant and the primary company. Once the Affiliated Applicant is added, it can be selected as the Project Developer or Eligible Customer during the application process. The Affiliated Applicants table will indicate if the Project Developer or Eligible Customer is listed on an active New Service Request. Any applicant associated with an active New Service Request cannot be deleted; however, the information may be updated. A company, such as TerraWatt, may have none or many Affiliated Applicants. All new applications can be made directly under the TerraWatt organization or any Affiliated Applicant created in the Company Profile; however, note that the company selected in an application should be the Project Developer or Eligible Customer that will be listed on any final agreement.

### **Saving Changes**

When you have completed the Company Profile, click **Save**, or if you have navigated to the Company Profile from within an application, click **Save & Continue Application**. If there are any fields with invalid responses, you will see an error message. Resolve any errors and click one of the save buttons again. Once all errors have been resolved, the Company Profile will be saved. If you clicked on the **Save** button, you will remain on the Company Profile page. If you clicked on the **Save & Continue Application** button, you will navigate back to the project application. You will see a confirmation at the top of the Company Profile page once it has been successfully saved.





# Adding, Editing or Deleting Affiliated Applicants (Project Developers and Eligible Customers)

### Adding a New Affiliated Applicant

To add a new Affiliated Applicant, click **Add New**, which will open a pop-up box. Add contact information and upload W-9 and Evidence of Binding Relationship documents in the dialog window.



To save the new Affiliated Applicant, click **Submit** in the pop-up. The pop-up will close, and you will see the Affiliated Applicant added to the table on the Company Profile page.

Affiliated applicant name 🕚 🕯		Country *
• Use tax reporting name		Select One
Address *		
City *	State/Province *	Zip/Postal code *
Primary phone number	Primary email address	
• (201) 555-0123		
Affiliated applicant tax ID *		
RS W-9 form or comparable state-issued doc + Choose	ument *	
Evidence of Binding Relationship *		

### Editing an Affiliated Applicant

To edit an Affiliated Applicant, click the **Edit** icon in the table to open a pop-up box. Edit contact information and documents in the pop-up.



Affiliated A Add any additi	Applicants onal Project Developers or Eligible Customers.
0	
Actions	
	PJM-Sub Project Developer

You can edit the Affiliated Applicant name until it is associated with a submitted project. Review the last column of the table to see which Affiliated Applicants have been selected for a project on an application.

Affiliated A	Applicants					
0	AVVIated Anticast Name 12	Ter ID 着			Associated with Project	
Actions	accuston addresses 18		W-9 Form	Evidence of Binding Relationship	All	2
	P.M.Sub Project Developer	12-1234567	(2)	۲	Yes	
	Records Por Pager (15 🐨 )	< 1-1 of 1 records > >>>				

Click **Submit** in the pop-up to save the changes to the Affiliated Applicant. The pop-up will close, and you will see updates in the table.

Edit Affiliateo Applicant		×
Affiliated applicant name 🕕 *		Country *
PJM-Sub Project Developer		United States 🗸 🗸
Address *		
2750 Monroe Blv		
City *	State/Province	Zip/Postal code *
Audubon	PA	19403
Primary phone number	Primary email addres	55
<b>* (215) 333-4444</b>	PJM@pjm.com	
Affiliated applicant tax ID *		
12-1234567		
RS W-9 form or comparable state-issued docume	ent *	
isurprised-test-file.txt		
Evidence of Binding Relationship *		
disappointed-test-file.txt		
		Cancel Submit



Click **Cancel** to close the pop-up without saving the changes to the Affiliated Applicant.



### **Deleting an Affiliated Applicant**

To delete an Affiliated Applicant, click the **Delete** icon in the table.

Affiliated A Add any additi	Applicants onal Project Developers or Eligible Customers.
Add New	
Actions	Affiliated Applicant Name
	PJM-Sub Project Developer

You can only delete Affiliated Applicants that have not been associated with a project. Review the last column of the table to see which Affiliated Applicants have been selected for a project.

Affiliated Add any addit	Applicants tional Project Developers or Eligible Customers.				
Add New					
	Affiliated Applicant Name	Tax ID 🖨	war		Associated with Project 🖨
Actions			W-9 Form	Evidence of Binding Relationship	All
	ABC Ltd.	12-1212121			No
	PJM-Sub Project Developer	12-1234567	6		Yes
		Records Per Page: 15 V << 1-2	of 2 records > >>>		



# **Letters of Credit**

Letters of Credit can be used to meet the requirements for Readiness Deposits. On the Letters of Credit summary or detail pages, you will upload a new Letters of Credit file and enter data about the file to be reviewed by PJM. On the Letters of Credit detail page, you can edit the Letters of Credit and upload an amendment. This process will also be used for draft versions of Letters of Credit and amendments. When you start an application, in the Deposit section you will be able to associate the application with a set of Letters of Credit and amendments for the project. Once the application is associated with Letters of Credit, you can continue to upload draft or signed Letters of Credit and amendments on the Letters of Credit pages for PJM to review.

# Accessing the Letters of Credit Pages

There are two ways to access the Letters of Credit pages.

### **Deposit Section of an Application**

In the Deposit section of an application, you will see a **Readiness deposit method** drop-down field. Select **Letters of Credit** to show Letters of Credit associated with this project that have been approved. If there are no Letters of Credit uploaded yet, no files will be displayed.



Click **Manage** to navigate to the Letters of Credit detail page where you can upload signed or draft Letters of Credit and amendments related to this project.

Readiness deposit method -		
Letter of Credit	~	
Letters of Credit for Readines	re Departit 1	
etters of credit for Readine.		Manage
LOC# 1	Issuing Bank 🗢	Readiness Deposit 1 🜩
LOC# 12 No records found.	Issuing Bank 🗢	Readiness Deposit 1 🗢



#### Letters of Credit Tab

When you are not working in an application and want to add a Letter of Credit or amendment, click on the Letters of Credit tab at the top of the application to navigate to the Letters of Credit summary page. On the Letters of Credit summary page, you can upload **new** Letters of Credit for a project. **Note:** The application for the project must be started before you can upload files for the project.

Projects	Cycle Timelines	Letters of Credit	Company Profile
----------	-----------------	-------------------	-----------------

### Letters of Credit Summary Page

This page has a list of all Letters of Credit associated with projects for your company. From here, you can upload Letters of Credit for project applications that have been started. If this is a signed or draft amendment, it is recommended that you upload the document on the Letters of Credit detail page, which will allow you to associate the amendment with the appropriate Letter of Credit. See Letters of Credit section for instructions.

- Letters of Credit Table: This table lists all Letters of Credit related to projects for your company. Using the table, you can filter and sort to find specific Letters of Credit.
  - Action Column: Clicking on the Project Detail page icon will navigate you to the Letters of Credit detail page for the selected Letters of Credit. The Letters of Credit detail page lists all signed and draft Letters of Credit and amendments related to one project.
    - **Submitted Amount:** The amount in this column combines the total of all signed and draft Letters of Credit and amendments.
  - Status: The status will show the progress of the Letters of Credit as they are reviewed.
    - Not Started: PJM has not started its review.
    - In Progress: PJM has started reviewing the Letters of Credit and/or amendments.
    - Changes Required: PJM has reviewed the Letters of Credit and/or amendments and changes to a file(s) are required.
  - **Draft Approved:** PJM has reviewed and approved the draft Letters of Credit and/or amendments. You should obtain a final copy from your bank and upload that to the Letters of Credit detail page.
  - Signed Approved: PJM has reviewed and approved a signed Letter of Credit and/or amendments.



- **Approval Pending**: PJM has reviewed and approved signed Letters of Credit and/or amendments; however, there are still revisions that must be made. When the revisions have been made, upload the new file to the Letters of Credit detail page.
- Return Pending: This Letter of Credit or amendment is in the process of being returned by PJM to the bank.
- Returned: This Letter of Credit or amendment has been returned by PJM to the bank.

### Uploading a New Letters of Credit

Click Add New LOC to display the upload wizard. If this is an amendment, it is recommended you click on the icon

in the table for the project the Letters of Credit is associated with and upload the file by editing the Letters of Credit on the detail page. This will associate the file with the appropriate Letters of Credit.



Click the **Previous** and **Next** buttons to navigate through the wizard. Click **Cancel** to exit the wizard without saving.

0	0	3	-(4)	5
Project	Documents	Readiness Deposits	Applicant	Bank Info
ocument Upload	đ			
+ Upload Actions		file Name 😭		Upload Date 🖨
No records found.				



#### Associating a Project to a Letters of Credit

On the first page of the upload wizard, you can select the project to associate this new Letter of Credit with. The list will include all projects associated with your company. You can search by the Project Name to filter the list. If you do not find your project in the search results, this means an application has not been started for the project or the project is with a company your login is not associated with.

0	2	3		5		
Project	Documents	Readiness Deposits	Applicant	Bank Info		
roject '						
Q	_					
C01-0002	181 NUCL	EAR				
C01-0004	Limerick (	Generating Station				
C01-0005	Big Sandy Expansion					
C01-0006	Conowingo Expansion					
C01-0007	PN Lackav	vanna Unit 2				
C01-0008	Conemauş	gh 3F				
C01-1002	Email ?					
C01-1001	NEXG-294					
C01-1000	Andys bac	kyard solar project				

When you have selected the project, click Next.

Select **Upload** to search for the Letters of Credit document. You can upload multiple files as long as they are all related to the same Letters of Credit. Valid file types include .docx, .doc and .pdf.

ipload a New Lett	er of Credit			
0	0	3	-(4)	5
Berlant	Documents	Readiness Deposits	Applicant	Bank Info
Project	d			
Project Occument Uploa ipload letters of cr etter of Credit nur + Upload	id redit and amendment mber.	ts for this project. All file	s must be associat	ted with the same

When you have uploaded all your files, click Next.



#### **Deposit Allocation**

Allocate the total of all Letters of Credit you are uploading to the appropriate Readiness Deposit(s). If you have uploaded multiple files, add together the amount of each file to determine the full amount to allocate.

Upload a New Lette	er of Credit			×			
0	2	3	4	5			
Project	Documents	Readiness Deposits	Applicant	Bank Info			
Deposit Allocatio	n						
Select the applicable readiness deposits and enter the respective amounts. Total of the Readiness Deposits should reflect the total amount of the letter of credit and any associated amendments. Amount for Readiness Deposit 1 * \$100,000.00 Amount for Readiness Deposit 2 * \$50,000 Amount for Readiness Deposit 3 *							
Comments							
				*			
1000 characters remain	ning			*			
			Cancel	Previous Next			

Once you have entered the dollar amounts, click **Next**.

#### **Applicant Information for Letters of Credit**

Enter information for the Letters of Credit, Project Developer/Eligible Customer name and contact information. The contact information should be the person PJM would contact if there are questions about the files.

Upload a New Lette	er of Credit			×
Project	2 Documents	3 Readiness Deposits	4 Applicant	5 Bank Info
Applicant Inform	nation for Letters	of Credit		
Project developer/6	Eligible customer na	me *		
PJM Interconnection	on			
Contact first name	±			
Contact last name	E Contraction of the second			
Contact email *				
			Cased R	haviaur Navt



#### Signed Letters of Credit information

If the uploaded file is a signed Letter of Credit, select **Yes** and answer the additional questions. Once you have entered the information, click **Submit**.

0	0	3	0	- 6
Project	Documents	<b>Readiness Deposits</b>	Applicant	Bank Info
igned Letter of	Credit Informati	on		
ave you included a	signed letter of cre	dit? *		
Yes No				
ank name *				
Name of issuing ba	ink			
etter of credit nun	iber *			
etter of credit issu	e date *			
	<b>m</b>			
etter of credit exp	iration date 4			
	蕭			

The wizard will close, and you will be returned to the Letters of Credit summary page. The file you uploaded will be added to the table with the status **Not Started**, meaning PJM staff has not started the review of the file. PJM staff will receive a notification that a file has been uploaded and needs to be reviewed.

### Letters of Credit Detail Page for a Specific Project

This page has a list of all Letters of Credit associated with a specific project for the company your login is associated with. You can upload new Letters of Credit (i.e., new LOC#) by using the Add New LOC wizard. The upload works the same as the Add New LOC wizard on the Letters of Credit summary page, except that you won't have to select a project to associate the Letter of Credit with. See Letter of Credit summary page – Uploading a New Letter of Credit.

If you have an amendment, select the Letter of Credit the amendment is for and then select **Edit** from the Actions list. By using **Edit**, you will group all files with the same LOC# together.



Projects	Cycle Timelines	Letters of Credit	Company Profile	
Readines	s Deposits for P	roject C01-0002	(J&J NUCLEAR)	
Download i Use our Rei Readiness I S4,000 per The MW val 1. MW e 2. MW c	Letter of Credit Tem adiness letter of credi Letter of Credit templ Deposits MW is required. Lues used in the calcu nergy (e.g., Maximum apacity (e.g., Capacit	plate t template to create y ate DOC lation is the greater of a Facility Output) y Interconnection Righ	our draft. Once comp (1) and (2) specified ts)	lete, add your document below for review. in the Application:
Document	s for Readiness De	posits		
Actions	LOC# 10	ls	suing Bank 🖨	State

### Manage Letters of Credit

Click on the **Actions** icon i and then Manage Letter of Credit. The Manage Letter of Credit wizard will display. You can view files that have already been uploaded, upload additional files related to this LOC#, change Readiness Deposit allocations and edit the information related to the Letters of Credit. If this is an amendment, select the Letter of Credit the amendment is associated with before selecting Edit on the Actions list. This will associate the amendment with the appropriate Letters of Credit. See **Uploading a New Letter of Credit** for information about the Letters of Credit Upload wizard.



![](_page_19_Picture_1.jpeg)

### **Commenting on Letters of Credit**

Click on the Actions icon 💷 and then Manage Comments to display comments from PJM identifying issues with

any files during their review. When you have a new comment from PJM, the **comment** icon will be highlighted. If you have uploaded multiple files, PJM will address all files that have been uploaded and identify files that need to be corrected. You can add comments that PJM will review to explain your resolution.

Add New LO	oc	
Actions	LOC# 12	
:		
:		1
:		Bank of Nova
Manage	Letter Of Credit	
Manage	Comments	
Email PJ	M	
Delete L	etter Of Credit	

Enter comments at the top of the pop-up window and click **Submit**. Your comments will be added to the table at the bottom of the pop-up window. You can include text that addresses the comments PJM staff has added about files that need correction. Your comments will be reviewed by PJM staff.

Comments					×
12345AB9 Comment *					
Submit					*
Actions	Date		Comment	Entered By	Status
	02/13/2025	Second Comment		Gayle Elliott	
	02/13/2025	First comment		Gayle Elliott	
			Records Per Page: 15 🗙 « < 1-2 of 2	records > >>	

The Comments table lists all comments entered by any Project Developer or PJM staff. A status will be displayed with the PJM comments. This status will reflect the status of Letters of Credit and amendments that have been reviewed by PJM staff.

If the Status is **Changes Required**, you will need to address the comments entered by PJM staff and possibly upload a new file.

![](_page_20_Picture_1.jpeg)

# **Deleting Letters of Credit**

Click on the **Actions** icon i and then Manage Comments to remove a Letter of Credit and all files associated with the Letter of Credit. The Delete icon will be disabled once the status of the Letter of Credit is **Signed Approved**, **Approval Pending**, **Refunded** or **Refund Pending**.

Add New L	oc	
Actions	LOC# 12	
:		
:		1
:		Bank of Nova
Manage	Letter Of Credit	
Manage	Comments	
Email P.	IM	
Delete L	etter Of Credit	

![](_page_21_Picture_1.jpeg)

# **Cycle Timelines**

The Cycle Timelines page provides a graphic display of the timing of stages in active Cycles. The blue bar indicates the current point in a Cycle. Stages that are active are shown as a solid color, while stages that are semitransparent indicate future stages.

To the right of the graph, NextGen will display the number of days remaining in an active Cycle/stage.

Proje	cts	Cycle Timelines Letters of Credit C	npany Profile		
		Cycle 01	Cycle 01 Cycle 02 Cycle 03		Upcoming Deadlines
	S				End of C01 Application Submission
-	0				47 days remaining
202	N	Application Submission			01/23/2023
	D				
	J				
	F				
	м				
	A	Application Review			
	м				
5	J				
202	J				
	A				
	S	DD 4	Application Submission		
	0				
	N				

Placing your cursor on a stage will display the beginning and end dates of the stage.

![](_page_21_Figure_7.jpeg)

![](_page_22_Picture_1.jpeg)

# How To Use Project Portfolio (as a Project Developer)

When viewing your project portfolio as a Project Developer, you will see all of your current assigned projects, as well as more detailed info about each one. You will also be able to perform various functions related to these projects, start a new project application or view transferred projects. This guide will take you through what you will be able to do through the project portfolio page.

# **Project Portfolio Default View**

On the Projects page, as a Project Developer you will be able to see your current assigned projects, along with informative columns.

	Projects g							
Projects	Cycle Timelines	Letters of Credit	Company Profile					Feedt
Project List	Project List New Project Application							
	Export: XLS							Export: XLS
	Proje	ect ID 😭	PD Project Name 🜲	Project Type 🌲	Stage 🖨	Last Updated By 🜲	Project Manager 🗢	Project Status 🌲
Actions					×			Approved, Data Defi 🗸
:	C01-0005		Big Sandy Expansion	Merchant Transmission	Application Review		Kent Piland	In Progress
:	C01-0006		Conowingo Expansion	Merchant Transmission	Application Review		Kent Piland	Overdue
:	C01-0007		PN Lackawanna Unit 2	Long-Term Firm	Phase 1		James Fennelly	Submitted
:	C01-0008		Conemaugh 3F	Generator Interconnection	Phase 1		James Fennelly	Incomplete
:	C01-1000		LTF 9001	Long-Term Firm	Application Submission	Ravichandra Guntaka		Submitted

Every column is searchable and sortable using the functions in the top row. On the left side of the table, you will see clickable function menus to access actions that you can take.

Clicking **Edit** in the Actions menu will take you to the Project Application page. You may only edit if the status of the project is Incomplete, In Progress or Data Deficient. You can see the statuses for every project on the last column of the grid.

Clicking **Delete** in the Actions menu will bring up a confirmation of deletion pop-up, where you confirm you want to delete the project. You may only delete a project when the status is **In Progress**.

Actions	Project ID 🌲
Edit	C01-0008
Delete	

### **Project Statuses**

• In Progress: The Project Developer or Eligible Customer is working on completing the application that has not been submitted to PJM.

![](_page_23_Picture_1.jpeg)

- **Submitted:** The application has been submitted, and PJM is reviewing. The Project Developer will not be able to edit or delete the application during this period, except for the Applicant Information and Deposit sections.
- **Incomplete:** PJM has completed their review, and there are issues that need to be addressed by the Project Developer or Eligible Customer. The Project Developer can make updates to the application and provide comments to PJM, but cannot delete the application. When all updates are made to the application, you must resubmit the application to PJM.
- **Ready for Review:** PJM has received the Completed New Service Request or Completed Application and will review the information during the Application Phase. The Project Developer will not be able to edit or delete the application during this period, except for the Applicant Information and Deposit sections.

![](_page_24_Picture_0.jpeg)

# How To Start a New Application

When starting a new application, you will need to choose one of the three types of application: Long-Term Firm, Merchant Transmission and Generation Interconnection. Each of these applications are different and will require different information from the applicant. Refer to <u>PJM Manual 14H</u> for additional information about each of the application types.

### Starting a New Application From the Projects Page

On the Projects page, as a Project Developer you will see a button at the top called **New Project Application**. Clicking this will take you into a screen to choose which application type you are going to be filling out. After selecting one of the three types, you will be redirected into filling out that type of application after clicking **Begin New ASA** (Application and Studies Agreement).

Projects	Cycle Timelines	Letters of Credit	Company Profile
Project Lis	t New Project Ap	plication	

New	Project Application
<b>Applic</b> An App	ation Studies Agreement (ASA) lication and Studies Agreement must be submitted for the following requests.
0	Generator Interconnections Request Interconnection of a new generation facility or to increase the capacity of an existing generation facility interconnected with the Transmission System in the PJM region, or Interconnect a generating unit to distribution facilities located in the PJM Region that are used to make wholesale sales using the output of the generating unit
0	Transmission Interconnection Request Interconnection or addition of a new Merchant Transmission Facility to the Transmission System or increase the capacity of existing Merchant Transmission Facilities interconnected with the Transmission System
0	Long-Term Firm Transmission Service for a period extending beyond the 18-month Available Transmission Capacity horizon
	Begin New ASA

![](_page_25_Picture_1.jpeg)

After selecting the application type, NextGen will navigate you to the respective application page. All required fields of each application must be filled out before the application can be validated and submitted.

If you have not yet completed a Company Profile, you will be taken to the Company Profile page to enter your Company Information. If you have completed a Company Profile, you will be taken to the Applicant Information page.

# **Applicant Information Section for All Applications**

When filling out the Applicant Information section, you will be asked to choose the Project Name, as well as your company and contact information.

Applicant Information		
Project Name *	Project ID	
	Unassigned	
Project Developer or Eligible Customer for this application *		
×		
Project Developer or Eligible Customer Company		Edit
Company name *		Country *
Address *		
City *	State/Province *	Zip/Postal code *
Primary phone number	Primary email address	
Company tax ID *	IRS W-9 form	
	No tax form found	
Are you using an agent?		

![](_page_26_Picture_0.jpeg)

mary Contact	
mary contact	
st name *	Last name *
nail *	Title *
/ill receive project information emails	
mary Phone *	Secondary phone
(201) 555-0123	(201) 555-0123
ernate Contact 1	
ernate 1 first name	Alternate 1 last name
ernate 1 email	Alternate 1 title
'ill receive project information emails	
ernate 1 phone	
<b>•</b> (201) 555-0123	
ternate Contact 2	
ernate 2 first name	Alternate 2 last name
	Alkemete 2 title
ernate z eman	Attenate z utte
nu receive project information emails	
nvoice Contacts	
rimary Contact	
irst name *	Last name *
mail *	Title
Will receive billing invoices	
rimary Phone *	Secondary phone
• (201) 555-0123	• (201) 555-0123
literate Contrat (	
ITOFDOTO 1 TIFET DOPDO	Alternate 1 Jast name
uternate 1 first name	Alternate 1 last name
iternate i first name	Alternate 1 last name
iternate 1 Irrst name	Alternate 1 last name Alternate 1 phone
Atemate 1 Imst name Atemate 1 email Will receive billing involces	Alternate 1 last name Alternate 1 phone (201) 555-0123
Iternate 1 Irrst name Iternate 1 email Will receive billing involces	Alternate 1 last name Alternate 1 phone (201) 555-0123
Iternate 1 mst name Vill receive billing involces Iternate Contact 2	Alternate 1 last name Alternate 1 phone (201) 555-0123
Iternate 1 Irrst name Vill receive billing involces Iternate Contact 2 Iternate 2 first name	Alternate 1 last name Alternate 1 phone Image: Alternate 2 last name Alternate 2 last name
Iternate 1 Irrst name Vill receive billing involces Iternate Contact 2 Iternate 2 first name	Alternate 1 last name          Alternate 1 phone         Image: Control of the state 1 phone         Image: Control of the state 1 phone         Alternate 2 last name
Iternate 1 Irrst name Vill receive billing involces Iternate Contact 2 Iternate 2 first name Iternate 2 email	Alternate 1 last name          Alternate 1 phone         Miternate 1 phone         Image: Alternate 2 last name         Alternate 2 phone
Iternate 1 Inst name Iternate 1 email Iternate Contact 2 Iternate 2 first name Iternate 2 email Will receive billing invoices	Alternate 1 last name          Alternate 1 phone         Alternate 1 phone         Image: Alternate 2 last name         Alternate 2 last name         Alternate 2 phone         Image: Alternate 2 phone

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors. All errors must be corrected to submit the application.

• (201) 555-0123

![](_page_27_Picture_1.jpeg)

# Merchant Transmission Facility Application

When starting a Merchant Transmission Application, you will be directed to the Point of Interconnection page to select which type of POI connection your project will have. Here you will select **Direct connection to a substation**, **Line Tap** or **Other connection type**.

Point of Interconnection			
Location of the proposed Point of Interconnection (POI) to the transmission system, including the substation name or the name of the line to be tapped (including the voltage), the estimated distance from the substation endpoints of a line tap, address, and GPS coordinates. If the Merchant Transmission Facilities has more than one Point of Interconnection with the PJM system, select "Other connection type" and describe the configuration.			
Type of POI connection *			
×			
Direct connection to a substation			
Line Tap	Save Draft Save & Validate Form		
Other connection type			

Selecting **Direct connection to a substation** will prompt you to enter the POI substation information, location details and interconnection voltage.

POI substation name *	Substation PSS/e bus number
Interconnection voltage *	Line name *
k	v
POI Location	
Queue Scope's tabular and geospatial applications with secure or secure + CEII data requires access approval in Account Manager. Follow the steps in the Queue Scope User Guide to set up or update your account in Account Manager for access.	
View Queue Scope Tool	
Latitude * Longitude *	
Must be between 34 and 44         N         Must be between -92 and -72         W	
Address	
•	
City State County Zip/Postal code	

Selecting **Line Tap** will have you enter information regarding the remote ends of the transmission line, substations A and B.

![](_page_28_Picture_1.jpeg)

Substation A name (from)				Substation A PSS/e Bus #	
Substation B name (to) *				Substation B PSS/e Bus #	
Distance from POI to substation A *				Distance from POI to substation B *	
			Miles		Miles
Interconnection voltage *				Total length of line	
			k٧		Miles
Queue Scope's tabular and geospatia data requires access approval in Acc Queue Scope User Guide to set up o for access.	il ap :ount r upo	plications with secure or secure + Manager. Follow the steps in the Jate your account in Account Man	+ CEII e lager		
Latitude *		Longitude *			
Must be between 34 and 44	N	Must be between -92 and -72	w		
Address					
0					
•					

Selecting **Other connection type** will prompt you to describe a clear and concise reason why you are selecting this option, as well as a detailed description about your preferred connection type.

Type of POI connection *		
Other connection type	$\checkmark$	
Describe the other connection type in detail *		

Click **Save Draft** to save your progress but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding once all errors are fixed.

### **Merchant Transmission Section**

Once you come to the Merchant Transmission Facility section of the application, you will be asked to **enter location information** either by GPS/address, or by entering a location description.

Merchant Transmission Facility	Facility Location Information *
Facility Location Information *	Location Description
GPS Coordinates / Street Address	
Substation name	Location description *
Latitude * Longitude *	
Address	
City State County Zip/Postal code	

![](_page_29_Picture_1.jpeg)

You will also be asked to enter additional information about your project including **Nominal Capability**, **Planned in**service date, Description of proposed facilities and equipment and your Proposed facility type.

Nominal Capability *	
MVA	Proposed facility type *
Planned in-service date *	Merchant Controllable A.C. Transmission Facility
mm/dd/yyyy Description of proposed facilities and equipment *	Select One
	Merchant A.C. (Uncontrollable) Transmission Facility
	Merchant Controllable A.C. Transmission Facility
6	Merchant D.C. Transmission Facility

After selecting your proposed facility type, you will be asked:

#### Is the Merchant Transmission Facility connected with another control area outside PJM?

If you select **Yes**, the Attachment Line Data section will appear where you will fill out information about your Attachment Line. If you select **No**, no other questions will appear.

![](_page_30_Picture_0.jpeg)

Is the Merchant Transmission Facility connected with another control are outside PJM? *	a		
Ves No			
What is the POI of the Merchant Transmission Facility at the point connec	ted outsi	de PJM? * 🚯	
			[1
Attachment Line Data			
Voltage level *			
	kV		
MVA Base: 100 MVA			
Attachment line length *	Milor	Conductor type	
	Miles		<b>v</b>
Impedance on MVA Base			
Total branch positive sequence impedance R *		Total branch positive sequence impedance X *	
	p.u.		p.u.
Total branch zero sequence impedance R0 *		Total branch zero sequence impedance X0 *	
	p.u.		p.u.
Total branch charging susceptance B *			
	p.u.		
Comments 🚯			

Following this section, you will be asked:

#### What incremental rights are you seeking?

Select one of the options in the drop-down menu. This will bring up a comment box for further clarification.

What incremental rights are you seeking? *	
	~
Incremental Auction Revenue Rights	
Incremental Capacity Transfer Rights	
Incremental Deliverability Rights	

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

![](_page_31_Picture_0.jpeg)

### Site Control & Supporting Documents

Once you come to the **Site Control & Supporting Documents** section of the application, you will be asked to provide various documentation about your project. Each file selector has a description of what documentation(s) is needed to validate the form. Some of the descriptions include links to provide clarity on what is needed.

Site Control & Supporting Documents Maximum upload size per file is 350 MB
Evidence of Ownership
In accordance with Tariff, Part VIII, Subpart B, section 402, provide evidence of an ownership interest in, or right to acquire or control through a deed, lease, or option for at least a one-year term beginning from the Application Deadline, 100 percent of the Site for the Generating Facility, including the location of the high voltage side of the Generating Facility's main power transformer(s).
Evidence of Ownership *
+ Choose
Site Control Review Spreadsheet
Project Developers must complete the "Document Details" and "Application Review Phase" tabs of the site control review spreadsheet. This document provides a mechanism for the developer to confirm that site control submissions are complete and assists PJM in the review process. Download the PJM Site Control review spreadsheet from the Planning Service Request page on PJM.com.
Site Control Review Spreadsheet *
+ Choose
Officer Certification Form
Provide a certification, executed by an officer or authorized representative of Applicant, verifying that the Site Control requirement is met. Name on the form must match Product Developer name in the Applicant section of this form. You can only upload a PDF copy of the form. Download the officer certification form from the Planning Services Request page on PJM.com.
Officer Certification Form *
+ Choose
Site Plan
Project Developers must submit a Geographic Information System (GIS) Site Plan map and data files acceptable to PJM showing the arrangement of the resource- specific proposed facilities for the amount of MWs requested in either of the following file formats: 1. ESRI Shapefile (.SHP). This is the PJM preferred format. 2. Google Earth KML (.KML or .KMZ)
The site plan must contain:
<ol> <li>property boundaries</li> <li>generating facility layout, including the generating facility's collector substation (if applicable) or interconnection switchyard (if required), and</li> <li>Interconnection Facilities extending from the Generating Facility's main power transformer(s) to the proposed POI</li> </ol>
Site Plan *
+ Choose
Landowner Attestation
If requested by PJM, provide copy of landowner attestations or county recordings.
Landowner Attestation *
+ Choose

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

![](_page_32_Picture_1.jpeg)

### **Transformer Information**

On the Transformer Information page, you will be asked to add transformers for either the Main Transformer type or the Step-up Transformer type. Once you click **Add transformer**, you will be asked to fill out additional information for each one you selected.

Transformer Information	
Aggregate identical generator step-up transformers in Dynamic Modeling Development Guidelines for more in	nto a single representative unit with the number of identical transformers identified on the form. Refer to the information.
Each application submission must include a Main Tr	ansformer.
Transformer type *	
Step-up Transformer	Add transformer
Main Transformer	
Step-up Transformer	
he cansionners have been added.	

You can also to duplicate or remove each transformer using the action buttons on the right. If the project has multiple transformers that are identical, do not use the copy feature. Instead, enter the number of identical transformers in the field.

Main Transformer - New					C I
Transformer name *		Number of identi	cal trans	formers *	
MVA base (Rating 1) *	MVA				
Cooling Class Designation(s) for Your Transformer					
Winding type *					
Two windings Three windings					
How many continuous ratings does the transformer have? *					
Two ratings Three ratings					
Dating 1 t		Dating 1 Cooling C	locc *		
Rating 1 *	MVA	Rating 1 Cooling C	lass *		
Rating 1 *	MVA	Rating 1 Cooling C	lass *		~
Rating 1 * I <b>mpedance on MVA base</b> All Values in p.u. on Transformer MVA base	AVM	Rating 1 Cooling C	lass *		~
Rating 1 * I <b>mpedance on MVA base</b> All Values in p.u. on Transformer MVA base High-side to low-side * R	AVM	Rating 1 Cooling C	lass *	High-side to low-side (X/R)	~
Rating 1 * Impedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side * R p.u.	AVM X	Rating 1 Cooling C	lass * p.u.	High-side to low-side (X/R) 0.000000	~
Rating 1 * mpedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side * R p.u.	AVM X	Rating 1 Cooling C	p.u.	High-side to low-side (X/R) 0.000000	~
Rating 1 *	AVM X	Rating 1 Cooling C	p.u.	High-side to low-side (X/R) 0.000000 High-side to low-side (X0/R0)	~

![](_page_33_Picture_0.jpeg)

Winding Nominal Voltag	es	
High-side *		Low-side *
	kV	kV
Winding Connection Typ	Des	
High-side *		Low-side *
	~	✓
Tap position		Off-nominal turns ratio
Number of taps		Step size
Comments		

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

![](_page_34_Picture_1.jpeg)

### **Deposits Section**

Here you will be asked to fill out your wire and banking information for the Readiness and Study deposits. First you will need to enter your banking information.

Banking and Deposit Information	
Please note:	
Before Transmission Provider will review or process the Application, in addition to submitting a completed Applicant must electronically submit to Transmission Provider prior to the Application Deadline the (i) require Readiness Deposit by wire transfer or letter of credit.	and signed Application prior to the Application Deadline, uired cash Study Deposit by wire transfer and (ii) required
Applicant's wire transfer(s) or letter(s) of credit must specify the Application reference number to which t Transmission Provider will not review or process the Application.	he Study Deposit and Readiness Deposit correspond, or
PJM Wire Information Account Name: PJM Interconnection Bank: PNC Bank, NA, 500 First Avenue, Pittsburgh, PA 15219 ABA Number: 031-207-607 Account Number: 8013589826 Swift Code: PNC CUS 33 888-762-2265	
<b>Project Developer Company</b> This information will be used to process refunds, as applicable during the study process.	
Bank name * Bank account name *	
ABA routing number Account number	

Following the banking information, you will need to select your Readiness Deposit method. If you select **Wire Transfer**, you will be asked to fill out wire information as well. To add wire information, click the **Add New Wire Transfer** button on the right side. If needed, you will be able to edit or delete wire information using the action buttons on the left side.

Readiness Deposit
Pursuant to Tariff, Part VIII, Subpart B, section 403 (A)(5)(b), Readiness Deposit No. 1 is an amount equal to \$4000 per MW amount and is required with the submitted ASA.
The MW values used in the calculation is the greater of (1) and (2) specified in the Application:
1. MW energy (e.g., Maximum Facility Output) 2. MW capacity (e.g., Capacity Interconnection Rights)
Readiness deposit one \$4,000.00 X 100.0000 = \$400,000.00
Readiness deposit method *
V
Letter of Credit
Wire Transfer

![](_page_35_Picture_1.jpeg)

Readiness depos	it method *					
Wire Transfer			$\checkmark$			
Wire Transfer	for Readiness Deposit 1				Add New Wire T	ransfer
Actions	Confirmation Number 12	Bank Account Name 🌲	Wire Transfer Date 🌲	Wire Received On 🗘	Amount 🖨	
No records fou	nd.					
		Records Per Page: 15 🗸	< < 0-0 of 0 records	>		
					Wire Transfer Total:	\$0.00

Enter Wire Transfer Details	×
Wire transfer confirmation number *	Bank account name *
	Account name wire being sent from
Wire transfer amount *	Comments
\$00,000.00	
Wire transfer date *	
Wire received on	
	Cancel

For the Study Deposit information, you will need to key in the amount of the deposit using the provided guide based on your megawatt energy. After entering the amount of the deposit, please add the wire(s) in the same fashion as the Readiness Deposit.

Facility Outp Up to 20 MW: Over 20 MW to Over 20 MW to Over 100 MW Over 250 MW Over 750 MW	arm, part vin, subpart b, secuo ut) or MV capacity (e.g., Capaci : \$75,000; up to 50 MW: \$200,000; up to 100 MW: \$250,000; up to 250 MW: \$300,000; up to 750 MW: \$350,000; and : \$400,000.	n 403 (A)(5)(a), the Study Dep ty Interconnection Rights), wi	oosit shall be calculated as fo nichever is greater:	lows, based on the number of	MW energy (e.g., Maximum
udy Deposit					
250 000 00					
\$250,000.00					
/ire Transfe	r for Study Deposit				Add New Wire Transfer
/ire Transfe Actions	r for Study Deposit Confirmation Number 12	Bank Account Name 🗢	Wire Transfer Date 🗢	Wire Received On 🗢	Add New Wire Transfer
/ire Transfe Actions No records for	r for Study Deposit Confirmation Number 12	Bank Account Name 🌩	Wire Transfer Date 🜲	Wire Received On 🗘	Add New Wire Transfer

![](_page_36_Picture_1.jpeg)

Enter Wire Transfer Details	×
Wire transfer confirmation number *	Bank account name *
	Account name wire being sent from
Wire transfer amount *	Comments
\$00,000.00	
Wire transfer date *	
Wire received on	
	Cancel

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

#### **Review Page**

On the Review page, you will be asked to choose how you would prefer to sign and submit your application. You may elect to sign the ASA electronically through NextGen or download the ASA for execution outside of NextGen. If you select **Electronic Signature**, you will be prompted to click the **Sign and Submit ASA** button where you can submit a signature. If you select **Download ASA and sign**, buttons will appear where you can download the unsigned ASA, upload it once you have signed it. A **Submit Application** button that is enabled once the signed ASA is uploaded.

![](_page_36_Picture_6.jpeg)

![](_page_37_Picture_1.jpeg)

Appli	cation and Studies Agreement (ASA) Review & Submission Instructions
Sign the	e Application and Studies Agreement (ASA) ectronic Signature 🔘 Download ASA and sign
1	Review, download and sign the Application and Studies Agreement (ASA) The "Download Unsigned ASA" button is available once all sections have been saved and validated.
	Download Unsigned ASA
2	<b>Upload a signed copy of the Application and Studies Agreement (ASA)</b> After signing the ASA, use the "Upload Signed ASA" button. The button is enabled once the unsigned ASA has been downloaded.
	+ Choose
3	Submit completed and signed application Applications are sent to PJM by clicking the "Submit Application" button. The button is enabled once the signed ASA has been uploaded.
	Submit

The agreement must be signed by the Authorized Signatory, not an agent. The NextGen system will verify that the email address of the user logged into the system matches the email address listed for the Authorized Signatory in the form. If the email addresses do not match, the system will prevent the agreement from being signed. For example, if "john.doe@pjm.com" is listed as the Authorized Signatory, only a user logged in as "john.doe@pjm.com" will be able to sign electronically.

The rest of Review page contains the information from the application. You can click the edit button on any section to be taken back to that section for editing.

All in-progress pages must be saved and validated before the application can be submitted to PJM for review. Each section of the application on the Review page will indicate if the corresponding section has been saved as a draft or Saved and Validated.

### Long-Term Firm Application

When starting a Long-Term Firm application, you will be directed to the Transmission Service Requests page to select which **Point of Receipt (POR) – Point of Delivery (POD)** combination and megawatt amount your project will have. After you have made your selection, click **Search** to find the applicable Transmission Service Requests (TSRs) to add to your application, or **Clear** to clear your inputs. This information must match the corresponding request in Open Access Same-Time Information System (OASIS).

![](_page_38_Picture_1.jpeg)

Long-Term Firm
Eligible Customers must first submit an application through PJM Open Access Same-Time Information System (OASIS) to request transmission service. Once complete, search for the Transmission Service Requests (TSRs) you would like to add to this application.
TSRs must be for the same Point of Receipt (POR) - Point of Delivery (POD) combination and megawatt amount as requested in OASIS.
POR-POD Amount
MW Search Clear
PJM-LLC PIM-LLC PIM-LLC

After you have selected one or multiple TSRs, click Add to continue to fill out information regarding your project.

TSR ID 12	POR-POD	Start Date 🖨	Stop Date 🖨	Amount (MW) 🖨
99001	PJM-LLC	10/01/2003	01/01/2049	1,000
99002	PJM-LLC	10/01/2003	01/01/2049	599
	Records Per Page: 15 🗸 «	< 1-2 of 2 records	>	

Your selected TSRs will appear on the main page. For each one, please fill out the requested information. To remove one of your selected TSRs, click the **Remove** button on the right side.

Transmission Service Requests		
TSR 99001		Remove
Start date and time *		Point of receipt (From area) *
06/01/2022 04:00		PJM
End date and time *		Point of delivery (To area) *
06/01/2027 04:00		LLC
Amount *		Date and time of request *
1,000.00	MW	01/01/2003 05:00
Path type *		What type of request is this for? *
Export		Point to Point
Path *		
F/PJM/PJM-LLC		
Is this TSR associated with a dynamic schedule or pseudo tie? $^{\star}$		
Yes No		
Substation or generator name *		Provide documentation of dynamic schedule or pseudo tie request submittal * (1)
Requested point of interconnection	]	+ Choose

![](_page_39_Picture_0.jpeg)

You will also be asked to select for each **Is this TSR associated with a dynamic schedule or pseudo tie.** Selecting **Yes** for this question will bring an additional question. Click **Choose** to provide your dynamic schedule or pseudo tie request documentation (email confirmation).

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

#### **Deposits Section**

Please refer to the Deposits subsection within the Merchant Transmission Facility Application section for guidance.

#### **Review Page**

Please refer to the Review subsection within the Merchant Transmission Facility Application section for guidance.

![](_page_40_Picture_0.jpeg)

### **Generation Interconnection Application**

When starting a Generation Interconnection Application, you will be directed to the Point of Interconnection page to select which type of POI connection your project will have. Here you will select **Direct connection to a substation**, **Line Tap** or **Other connection type**. Selecting **Direct Connection** will prompt you to enter substation and location information.

![](_page_40_Figure_4.jpeg)

![](_page_41_Picture_1.jpeg)

Selecting Line Tap will prompt for additional information about each substation as well as the line.

Project Developer Interconnection Facility	Substation A		Network Upgrade	Substation B	
<ul> <li>Transmission Owner Interconnection Facility</li> </ul>					
Network Upgrades				Transmission Owner	
Point of Interconnection     in C			f Change nership		
Point of Change in				Project	
Ownership				Developer	
station B name (to) * tance from POI to substation A *			Substation B PSS/e Bus # Distance from POI to substation B *		
	м	iles			Miles
erconnection voltage *			Total length of line		
		kV			Miles
I Location sue Scope's tabular and geospatial applicatio a requires access approval in Account Manag sue Scope User Guide to set up or update you ess.	ns with secure or secure + CEI er. Follow the steps in the ur account in Account Manage	ll r for			
itude * Longit	ude *		Line name *		
ust be between 34 and 44 N Must	be between -92 and -72	w			

![](_page_42_Picture_1.jpeg)

For both **Line Tap** and **Direct Connect**, there is an option to have a shared facilities agreement. If you select **Yes** for this prompt, you can upload the agreement as well as select the queue number or facility name for how you want to identify the other Generating Facility sharing interconnection facilities.

Shared Project Developer Interconnection Facilities
Is the existing project sharing Interconnection Facilities subject to an interconnection request or agreement with PJM or a two-party agreement with the Transmission Owner? *
O Yes No
Project Developers may submit an Interconnection Request behind the Point of Interconnection (POI) of another Project Developer's Generating Facility, if:
a. The new addition will have a separate Main Power Transformer (MPT) from the existing facility MPT; and b. All Project Developers behind the POI agree to enter into a shared facility agreement for any common Interconnection Facilities proposed.
Note: If a Project Developer is submitting an Interconnection Request behind the POI of a Generating Facility owned by the same Project Developer, this constitutes an increase in capability to the existing Generating Facility and does not require a shared facility agreement. Requests to increase capability should select "No" above.
Shared Facilities Agreement * () + Choose
Will you provide a Queue Number/Project ID or existing facility name for the shared generating facility? *
O Interconnection request with Queue Number / Project ID 💦 Two-party Agreement
Queue Number or Project ID of Generating Facility with which this project will share interconnection facilities *

Selecting **Other connection type** will prompt for a brief description about the type of connection you want to use. Provide a clear and concise reason why you are selecting this option, as well as a detailed description about your preferred connection type.

Point of Interconnection		
ocation of the proposed Point of Interconnection oltage), the estimated distance from the substati	(POI) to the transmission system, including the substation ion endpoints of a line tap, address, and GPS coordinates.	name or the name of the line to be tapped (including the
ype of POI connection *		
Other connection type	~	
escribe the other connection type in detail. Then	e should be a clear and concise reason why "Other" is bein	ng selected followed by a detailed description *
		Save Draft Save & Validate Form

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

![](_page_43_Picture_0.jpeg)

#### **Generating Facility Information**

Please select the nature of your Generating Facility project from the drop-down options and continue to fill out the questions for your selected option.

Generating Facility Information	
Nature of the generating facility project * 1	
×	
<ul> <li>Build new generating facility</li> </ul>	
Increase in capability of existing generating facility	Save Draft Save & Validate Form
Replacement of existing generating facility with no increase in generation capability	

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

#### **Site Control and Supporting Documents**

Once you come to the Site Control & Supporting Documents section of the application, you will be asked to provide various documentation about your project. Each file selector has a description of what documentation(s) is needed to validate the form. Some of the descriptions include links to provide clarity on what is needed. Only one file may be uploaded for each section. To submit multiple files at once, please place them into a zip file before uploading.

Site Control & Supporting Documents Maximum upload size per file is 350 MB
Evidence of Ownership
In accordance with Tariff, Part VIII, Subpart B, section 402, provide evidence of an ownership interest in, or right to acquire or control through a deed, lease, or option for at least a one-year term beginning from the Application Deadline, 100 percent of the Site for the Generating Facility, including the location of the high voltage side of the Generating Facility's main power transformer(s).
Evidence of Ownership *
+ Choose
Site Control Review Spreadsheet
Project Developers must complete the "Document Details" and "Application Review Phase" tabs of the site control review spreadsheet. This document provides a mechanism for the developer to confirm that site control submissions are complete and assists PJM in the review process. Download the PJM Site Control review spreadsheet from the Planning Service Request page on PJM.com.
Site Control Review Spreadsheet *
+ Choose
Officer Certification Form
Provide a certification, executed by an officer or authorized representative of Applicant, verifying that the Site Control requirement is met. Name on the form must match Product Developer name in the Applicant section of this form. You can only upload a PDF copy of the form. Download the officer certification form from the Planning Services Request page on PJM.com.
Officer Certification Form *
+ Choose

![](_page_44_Picture_1.jpeg)

Site Plan
Project Developers must submit a Geographic Information System (GIS) Site Plan map and data files acceptable to PJM showing the arrangement of the resource- specific proposed facilities for the amount of MWs requested in either of the following file formats: 1. ESRI ShapeFile (.SHP). This is the PJM preferred format. 2. Google Earth KML (.KML or .KMZ)
The site plan must contain: 1. property boundaries 2. generating facility layout, including the generating facility's collector substation (if applicable) or interconnection switchyard (if required), and 3. Interconnection Facilities extending from the Generating Facility's main power transformer(s) to the proposed POI
Site Plan * + Choose
Landowner Attestation
If requested by PJM, provide copy of landowner attestations or county recordings.
Landowner Attestation *
+ Choose

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

#### **Project Capability**

The Project Capability section asks about your capabilities in different seasons. Please follow the prompts to fill out all necessary information. This section will also ask for Load Definition and Fuel Information for your project at the bottom of the section.

Project Capability				
Behind The Meter				
Does this application include Behind the Meter generation which will be designated, in whole or in part, as a Capacity Resource or Energy Resource? *				
Yes No				
Type of interconnection service reque	ested for the generating facility *			
		~		
Summer Capability				
	New Facility			
Gross generator output *		MW		
	New Facility			
Station service load * 🜖		MW		
	New Facility			
Station service load reactive * 🜖		MVAR		
	New Facility			
Auxiliary load * 🚺		MW		
An alternation of the state	New Facility			
Auxiliary load reactive *		MVAR		
Total man land t	New Facility			
Total max toad	0.0000	ww		
	New Facility			
Net energy * 😈		MW		
Winter values are same as Summ	er values			
	Winter values are same as Summer values			

![](_page_45_Picture_0.jpeg)

aximum facility output *  aximum facility output * aximum facility outp	MW  Hd? *  reen the generating facility and the co-located load, as shown in the single-line diagram. If the station load connection. *	
bad Definition here is the station load being connecte escribe the electrical connections betw ther <sup>®</sup> location, also describe the conne	een the generating facility and the co-located load, as shown in the single-line diagram. If the station load conne	
here is the station load being connecte scribe the electrical connections betw ther" location, also describe the conne	ed? * veen the generating facility and the co-located load, as shown in the single-line diagram. If the station load conne ction. *	
escribe the electrical connections betw ther <sup>®</sup> location, also describe the conne	reen the generating facility and the co-located load, as shown in the single-line diagram. If the station load conne	
escribe the electrical connections betw ther" location, also describe the conne	veen the generating facility and the co-located load, as shown in the single-line diagram. If the station load conne ction. *	
		ction is
ientify the type and size of the load co	-located (or to be co-located) with the generating facility. *	
' the Generating Facility will be a multi nulti-fuel Generating Facility, describe t	-fuel Generating Facility, or if a proposed increase in generation capability of an existing Generating Facility will the physical and electrical configuration in as much detail as possible. *	reate a
rimary fuel type *		
	~	
Tanta Kasakanan ( 🔿		
+ Choose		
Dynamic File(s) *		
Dynamic File(s) * Prepared in accordance with the PJM Dy	namic Model Development Guidelines.	
Dynamic File(s) * Prepared in accordance with the PJM Dy + Choose	namic Model Development Guidelines.	
Dynamic File(s) * Prepared in accordance with the PJM Dy + Choose	namic Model Development Guidelines.	

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![](_page_46_Picture_1.jpeg)

#### **Generator Information**

When you come to the Generator Information page, you will be asked to add generators based on their type. Once you add a generator, you will be prompted to provide additional information about each generator. You can also delete generators from the list by clicking the delete action button on the right. Generator Information should be entered in accordance with the PJM Dynamic Model Development Guidelines (PDF).

Generator Information		
For Inverter based resources, aggregate to the Dynamic Modeling Development (	identical units Guidelines for r	; into a single representative generator with the number of identical generators identified on the form. Refer more information.
Generator type *	~	Add Generator
	A .	
Biomass		
Coal		
Diesel		
Flywheel		
Fuel Cell		Save Draft Save & Validate Form
Hydro	-	
11-sk	_	

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

#### **Transformer Information**

On the Transformer Information page, you will be asked to select and add transformers based on their type. Once you add a transformer, you will be asked to provide additional information about each one. You can duplicate or remove transformers by clicking the action buttons on the right. Follow the prompts to answer all questions for each transformer in accordance with the PJM Dynamic Model Development Guidelines.

Transformer Information			
Aggregate identical generator step-up transformers into a single representative unit with the number of identical transformers identified on the form. Refer to the Dynamic Modeling Development Guidelines for more information. Each application submission must include a Main Transformer.			
Transformer type *	Add transformer		
Main Transformer Step-up Transformer No transformers have been added.			

![](_page_47_Picture_0.jpeg)

![](_page_47_Picture_1.jpeg)

∨ Main Transformer - New		e 🗇 🗇
Assigned machines		
Q		Q
Available Machines		Machines Assigned to Transformer
345		>
	;	»
		<
	• • • • • • • • • • • • • • • • • • •	«
Transformer name *		Number of identical transformers *
MVA base (Rating 1) *		
Cooling Class Designation(s) for Your Transformer	AVM	
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings	MVA	
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? *	AVA	
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings	MVA	
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 *	AVA	Rating 1 Cooling Class *
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 *	MVA	Rating 1 Cooling Class *
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 * Impedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side *	MVA	Rating 1 Cooling Class *
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 * Impedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side * R	MVA MVA X	Rating 1 Cooling Class *
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 * Impedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side * R p.u.	MVA MVA X	Rating 1 Cooling Class *
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 * Impedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side * p.u. High-side to low-side *	MVA MVA X	Rating 1 Cooling Class *
Cooling Class Designation(s) for Your Transformer Winding type * Two windings Three windings How many continuous ratings does the transformer have? * Two ratings Three ratings Rating 1 * Impedance on MVA base All Values in p.u. on Transformer MVA base High-side to low-side * R p.u. High-side to low-side * R0 p.u.	MVA	Rating 1 Cooling Class *

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

![](_page_48_Picture_1.jpeg)

### **Attachment Line Data**

The Attachment Line Data section will prompt you for information about your voltage level and line. Follow the prompts to enter all necessary information.

MVA Base: 100 MVA         Attachment line length *       Conductor type         Impedance on MVA Base         Total branch positive sequence impedance R *       Total branch positive sequence impedance X *         p.u.       p.u.         Total branch zero sequence impedance R0 *       Total branch zero sequence impedance X0 *         p.u.       p.u.         Total branch charging susceptance B *       p.u.         Comments ①       p.u.	Voltage level *	kV		
Attachment line length * Conductor type     Miles     Impedance on MVA Base   Total branch positive sequence impedance R *      Total branch positive sequence impedance R *      p.u.     Total branch zero sequence impedance R0 *      p.u.     Total branch charging susceptance B *      p.u.     Comments ①	MVA Base: 100 MVA			
Miles       Miles         Impedance on MVA Base       Total branch positive sequence impedance X *         Total branch positive sequence impedance R *       p.u.         Total branch zero sequence impedance R0 *       Total branch zero sequence impedance X *         Total branch zero sequence impedance R0 *       Total branch zero sequence impedance X *         Total branch zero sequence impedance R0 *       p.u.         Total branch charging susceptance B *       p.u.         Comments ③       p.u.	Attachment line length *		Conductor type	
Impedance on MVA Base         Total branch positive sequence impedance R *         Dual branch zero sequence impedance R0 *         Total branch zero sequence impedance X *         p.u.         Total branch zero sequence impedance X *         p.u.         Total branch zero sequence impedance X *         p.u.         Total branch charging susceptance B *         p.u.         Comments ()		Miles		~
Total branch zero sequence impedance R0 * Total branch zero sequence impedance X0 * p.u. Total branch charging susceptance B * p.u. Comments 3	Impedance on MVA Base Total branch positive sequence impedance R *	DU	Total branch positive sequence impedance X *	
p.u.     p.u.       Total branch charging susceptance B *     p.u.       Comments ()     p.u.	Total branch zero sequence impedance R0 *	proc	Total branch zero sequence impedance X0 *	pro
Total branch charging susceptance B * p.u.		p.u.		p.u.
p.u.	Total branch charging susceptance B *			
Comments 🕦		p.u.		
	Comments 🜖			

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

![](_page_49_Picture_1.jpeg)

### **Collector System Equivalent**

The Collector System Equivalent section will ask you if your project has Collector System Equivalent data. If you select **Yes**, you will be prompted to add additional information about your Collector System data. If you select **No**, you can continue on to the next section.

Collector System Equivalent			
Does the project have collector system equivalent data (modeled betwee	en main tra	ansformer and step-up transformers)? *	
O Yes No			
Voltage level *			
	) kV		
MVA Base: 100 MVA			
Total branch positive sequence impedance *			
R		x	
	p.u.		p.u.
Total branch zero sequence impedance *			
R		x	
	p.u.		p.u.
Total branch charging susceptance *			
		В	
			p.u.
Lumped collector system *			
+ Choose			
Comments			

Click **Save Draft** to save your progress, but not validate the form. Click **Save & Validate Form** to check the form for errors before proceeding when errors are fixed.

#### **Deposits Section**

Please refer to the Deposits subsection within the Merchant Transmission Facility Application section for guidance.

#### **Review Page**

Please refer to the Review subsection within the Merchant Transmission Facility Application section for guidance.

![](_page_50_Picture_0.jpeg)

# Section 11: Revision History

Date	Rev	Changes
02/25/2025	0	Initial Issue
3/12/2025	1	Updated Commenting on Letters of Credit and improved language throughout the document.